

Zendesk Chat Essentials



zendesk



An Overview of
Zendesk Chat

Set Up
Zendesk Chat

Optimize
Zendesk Chat

Measure
Zendesk Chat

An Overview of Zendesk Chat

An Overview of Zendesk Chat

Walk through the Chat Lifecycle

An Overview of Zendesk Chat



An Overview of Zendesk Chat

Zendesk family of products



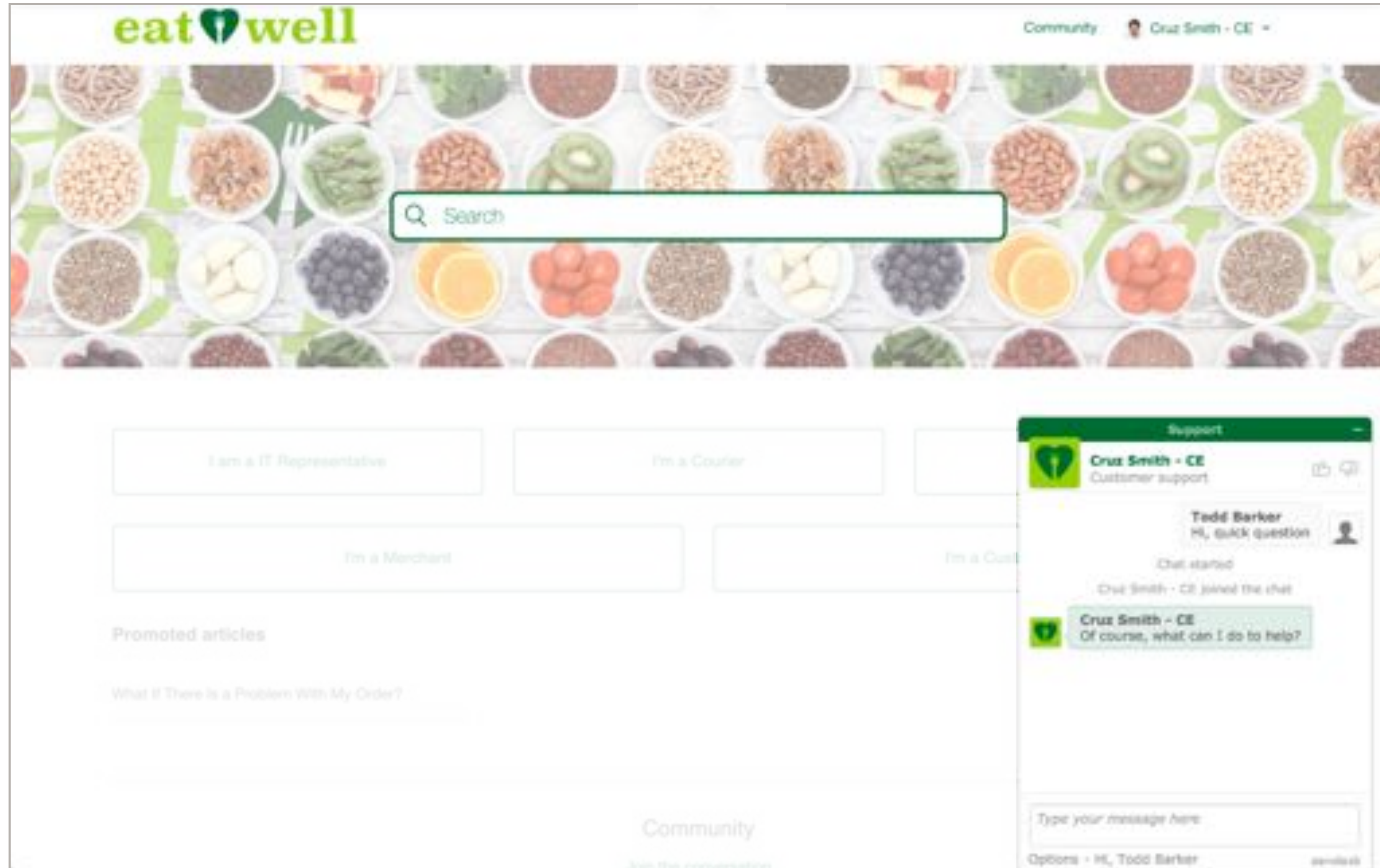
An Overview of Zendesk Chat

Zendesk family of products



An Overview of Zendesk Chat

The Chat experience



An Overview of Zendesk Chat

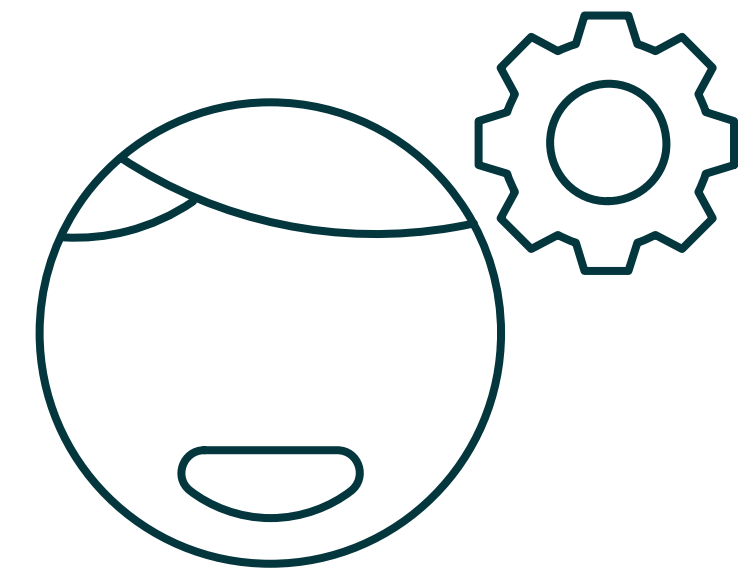
User roles



Website Visitors
chat with agents while
visiting their website.



Chat Agents *
chat with visitors to
resolve requests.



Chat Administrators
manage how Zendesk Chat
settings and features are
set up.

* Chat agents can be Chat-only or use both Support and Chat



An Overview of Zendesk Chat

The Chat dashboard for admins

Chat Settings



Analytics

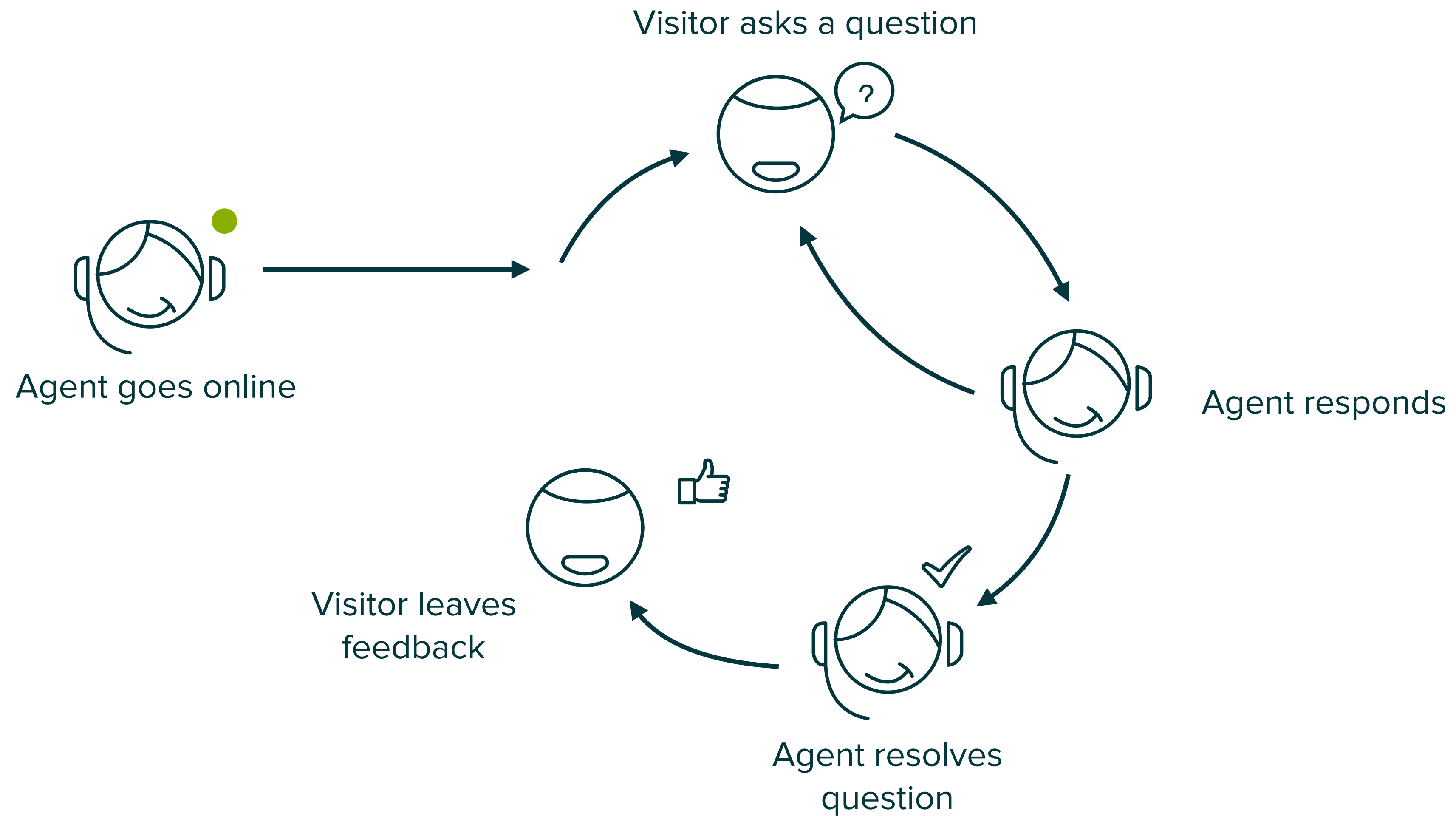


Walk Through the Chat Lifecycle



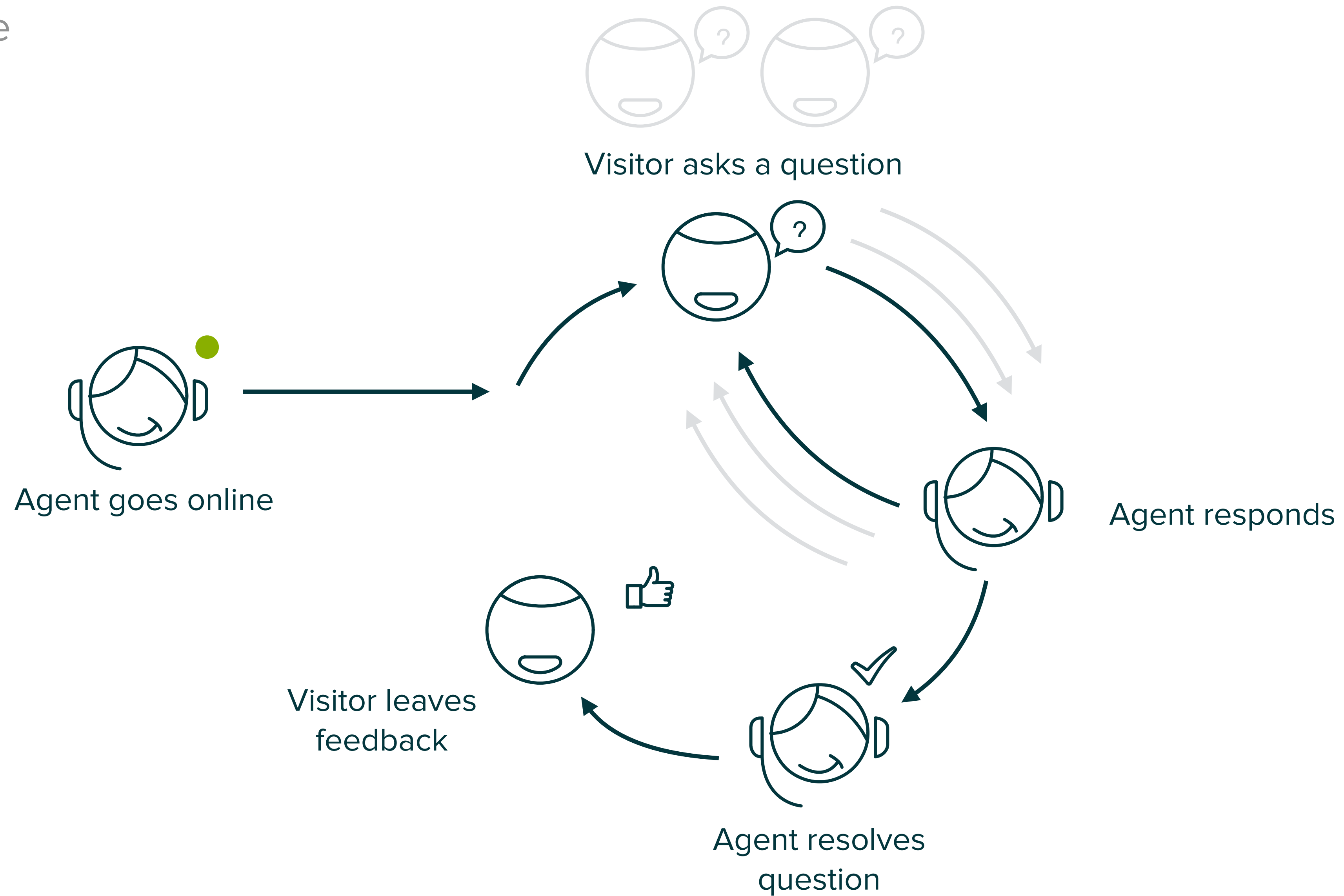
Walk Through the Chat Lifecycle

Chat timeline



Walk Through the Chat Lifecycle

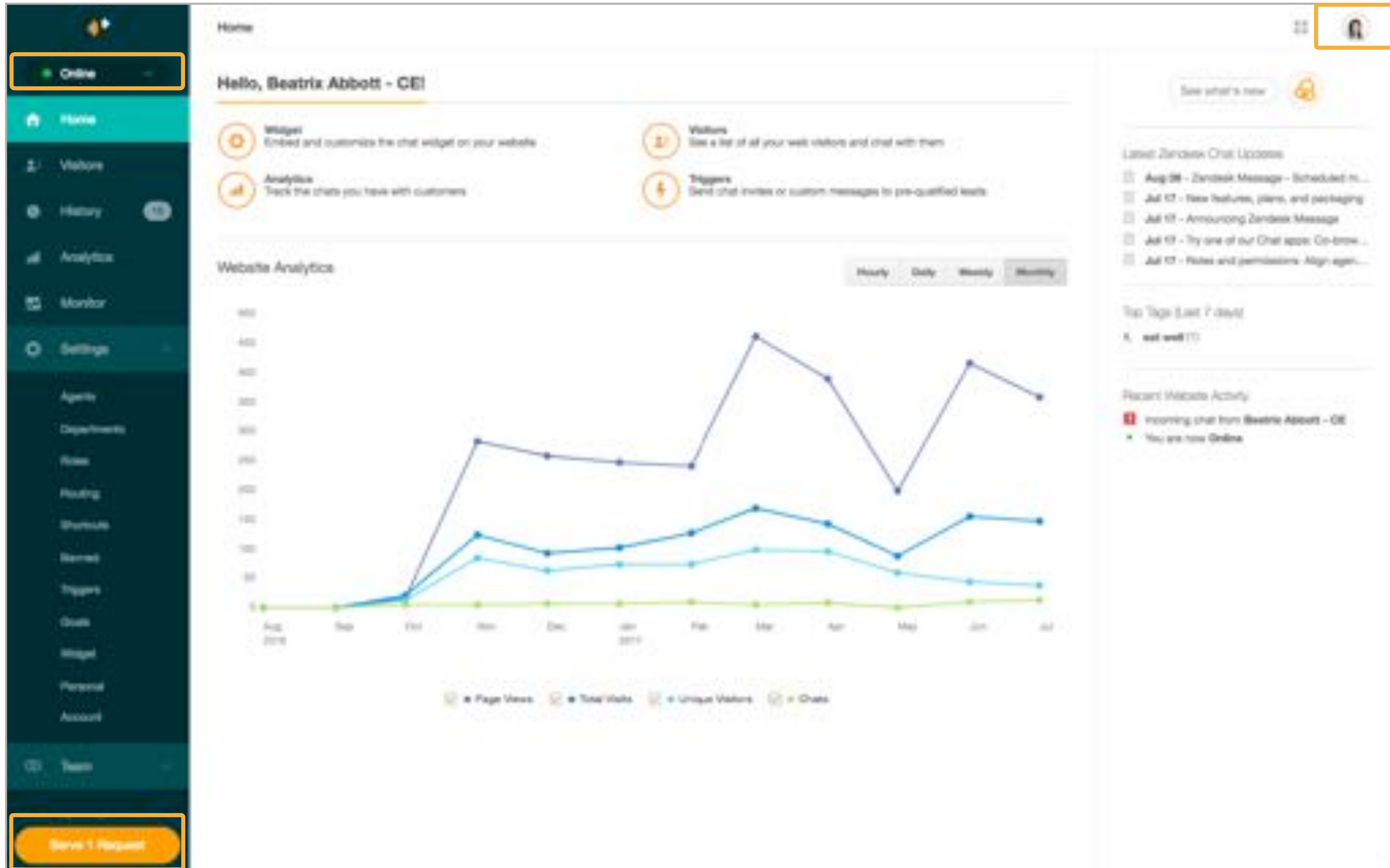
Chat timeline



Walk Through the Chat Lifecycle

Overview of the Chat dashboard for agents

Agent Status



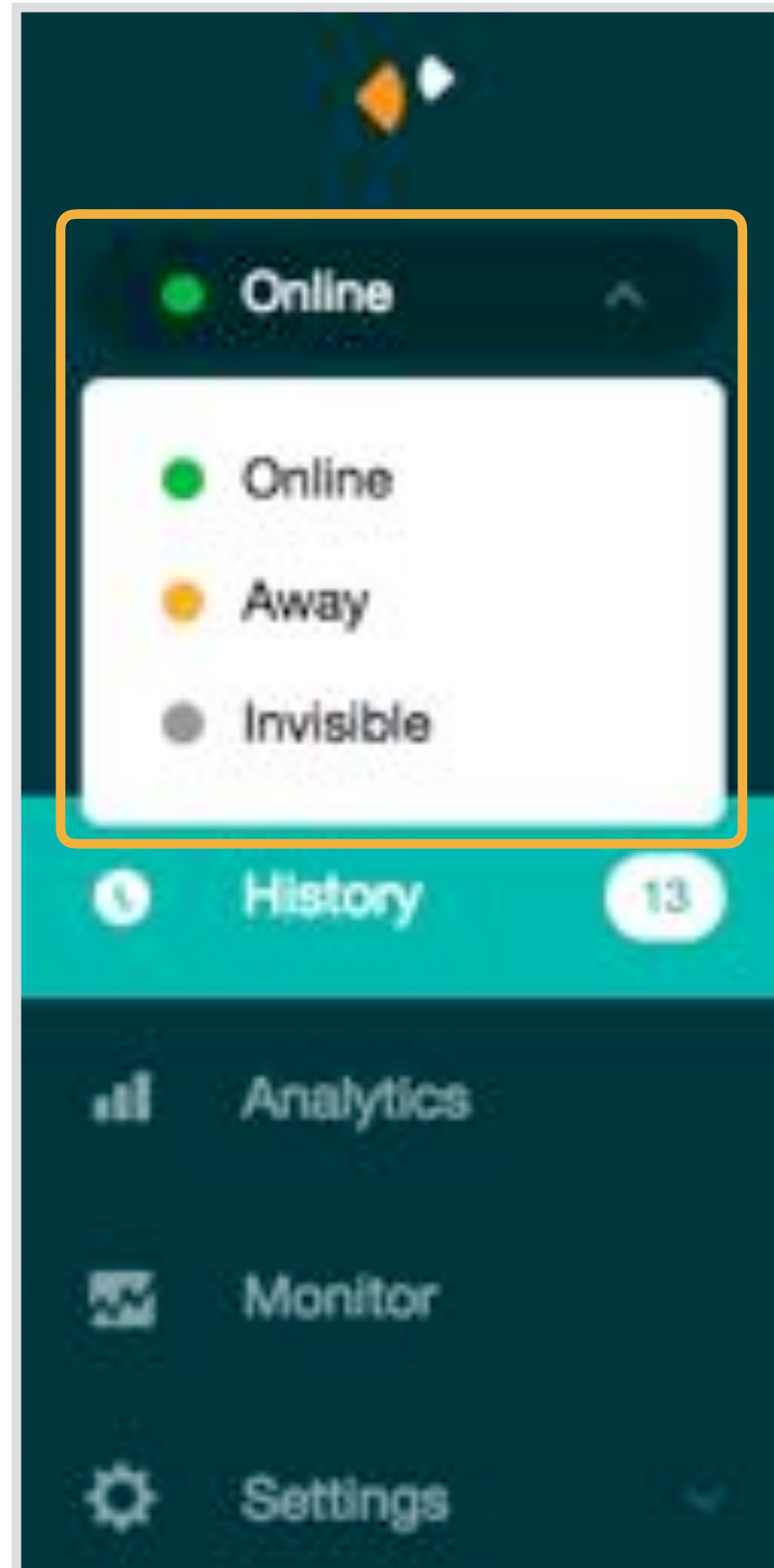
Agent Profile

Incoming Request



Walk Through the Chat Lifecycle

Chat status



Online shows customers and other agents you're available.

Away shows other agents you're away, and chats will not be routed to you.

Invisible allows you to log into the dashboard but not be seen as online.

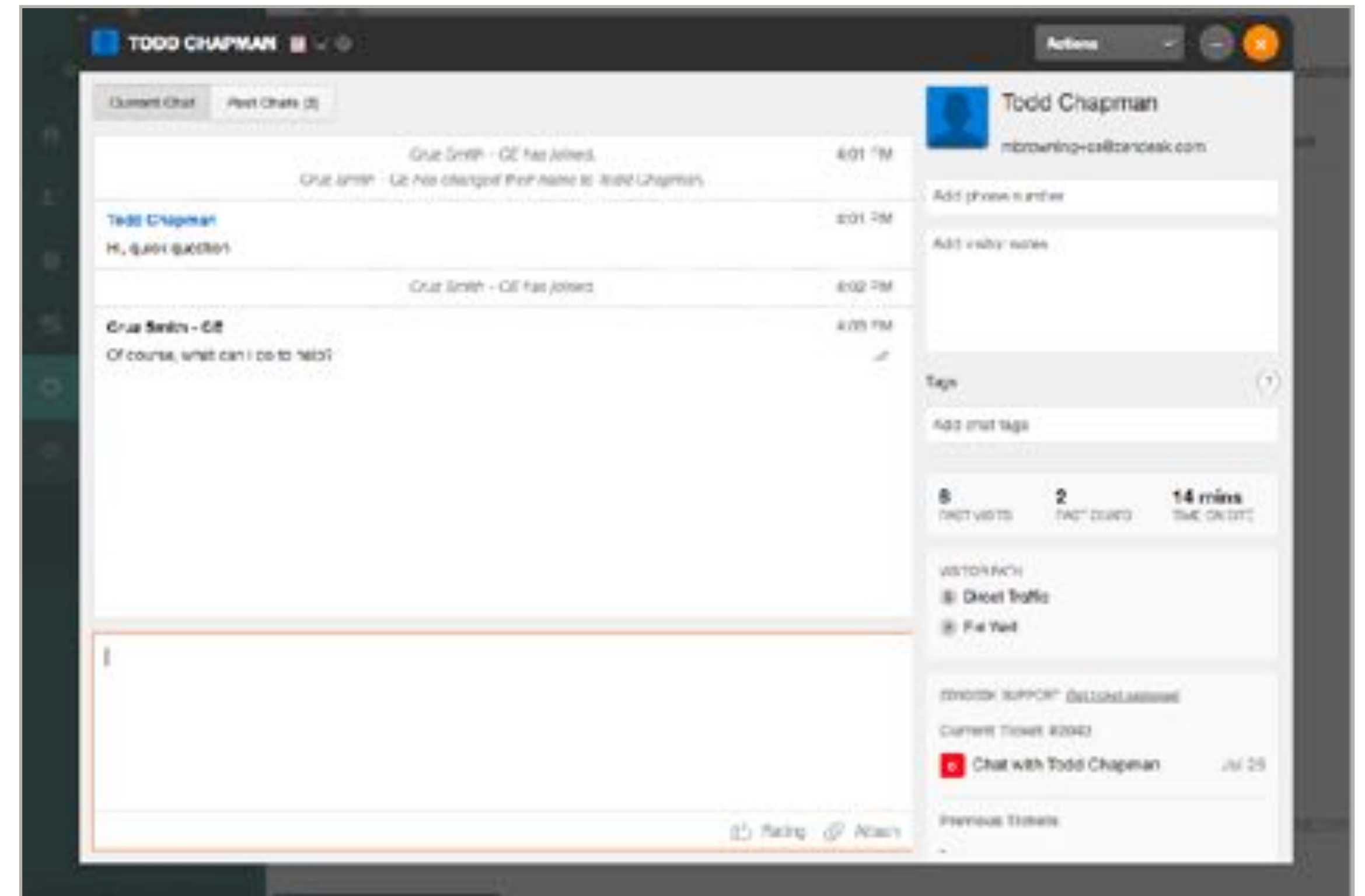
When all agents are invisible or away, the chat widget does not appear.

Walk Through the Chat Lifecycle

The Chat experience



Visitor's Experience



Agent's Experience

Demo

Walk through the Chat lifecycle

Walk Through the Chat Lifecycle

Visitors list

The screenshot displays a 'Visitors' dashboard with a sidebar on the left containing navigation options: Online, Home, Visitors (highlighted), History, Analytics, Monitor, Settings, and Team. The main content area is titled 'Visitors' and includes a 'List' button, a 'Viewed' button, and a 'Total: 3' indicator. A search bar and a 'Group by Activity' dropdown are also present. The dashboard is divided into three sections, each with a corresponding label on the right:

- Incoming Chats:** A table with columns for Visitor, Online, Message, Viewing, Waits, and Chats. It shows one entry for George Wilson with a message 'Hi, quick question...' and a 'View' button.
- Currently Served:** A table with columns for Visitor, Online, Served by, Viewing, Referrer, Waits, and Chats. It shows one entry for Sarah Trankinn with a 'View' button.
- Active Visitors:** A table with columns for Visitor, Online, Viewing, Referrer, Waits, and Chats. It shows one entry for #14303364 with a 'View' button.

At the bottom left, there is a yellow button labeled 'Serve 1 Request' and a small chat window for Sarah Trankinn.

Incoming Chats

Currently Served

Active Visitors

Incoming Request



Demo

Use the visitor list to proactively chat

Looking at this visitor list, how long has Beatrix been online?



Visitors

List View Total: 2

Group by Activity

Incoming Chats Visitors: 1

Visitor	Online	Message	Viewing	Visits	Chats
Mary	0 min	Hi there	Exit Web	-	-

Active Visitors Visitors: 1

Visitor	Online	Viewing	Referrer	Visits	Chats
Beatrix Abbott - CE	5 min	Exit Web	exitwell.zendesk.co...	12	0

An Overview of Zendesk Chat

An Overview of Zendesk Chat

Walk through the Chat Lifecycle



Set Up Zendesk Chat

Add Agents

Add Roles and Permissions

Set Up and Configure Your Web Widget

Add Operating Hours

Configure Support Ticket Creation

Add Agents



Demo

Add an agent to Chat

Add Agents

Try it!

Add an agent

1. Navigate to **Settings** > **People** > **Agents**, select an existing Support agent.
2. Toggle the **Zendesk Chat** button on.
3. To make the agent Chat-only, select the **Role** menu and choose **Chat-only**.



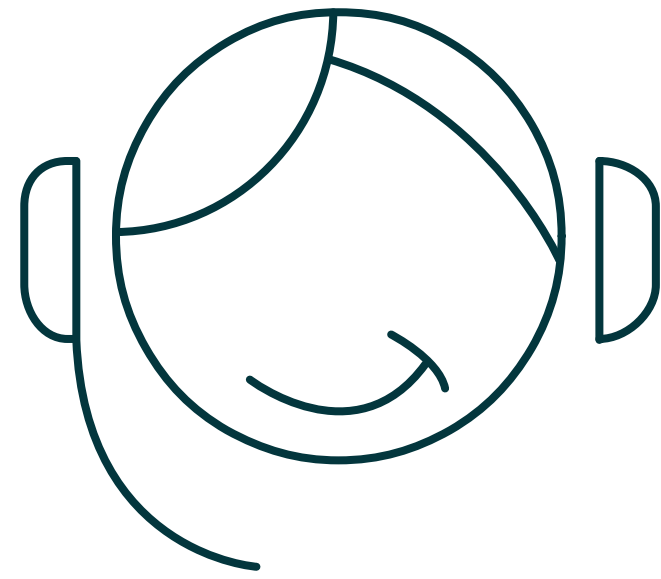
Define Custom Roles and Permissions



Custom roles enable you to **define agent permissions.**

Define Custom Roles and Permissions

Setting agent roles and permissions



Agent 1

Is part of a large team and is only responsible for chatting with customers. This agent should not have access to data about their peers.



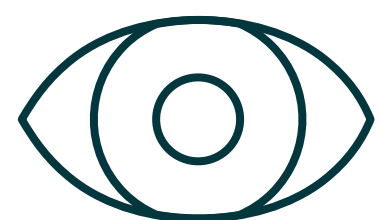
Agent 2

Leads a team and needs to run reports so they can give feedback to the agents on their team.

Define Custom Roles and Permissions

Roles and Permissions

Custom roles let you set permissions to define who can:



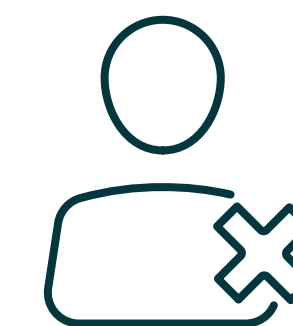
See visitors



Listen in on chats



Access historical
chats



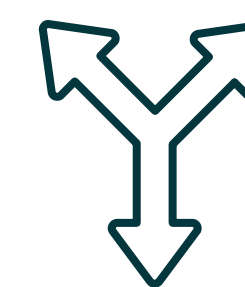
Ban visitors



Access analytics



Edit departments



Add shortcuts

Define Custom Roles and Permissions

Create a custom role

The screenshot displays the 'Roles' management interface. On the left, a dark sidebar contains navigation options: Home, Visitors, History (14), Analytics, Monitor, Settings (highlighted), Agents, Departments, Roles (highlighted with an orange box), Routing, Shortcuts, Banned, Triggers, Queues, Widgets, Personal, Account, and 0 Requests. The main content area is titled 'Roles' and includes a search bar, an 'Add Role' button, and a table of existing roles. The table has columns for Name, Description, Agents, and Enabled. Below the table, a message states: 'Create roles to align with your organizational structure and customize permissions of agents.'

<input type="checkbox"/>	Name	Description	Agents	Enabled
<input type="checkbox"/>	Owner	The person who set up the account, in addition to agent and administrative privileg...	0	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Administrator	In addition to regular agent privileges, administrators can edit widget and account...	11	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Agent	Agent is the most basic role in an account, and their primary responsibility is to ser...	1	<input checked="" type="checkbox"/>

Demo

Define custom roles and permissions

Set Up and Configure Your Web Widget



Set Up and Configure Your Web Widget

The web widget is **what your customers use to chat with agents**. Admins use it to match the website brand and combine Zendesk products.



Set Up and Configure Your Web Widget

What are you trying to achieve?



Happy customers



Higher sales



Lower costs

Set Up and Configure Your Web Widget

The screenshot shows the Zendesk administration interface. On the left is a dark sidebar with navigation icons and a menu. The main content area is titled "Channels / Widget" and contains configuration options for a widget named "Omni Wear".

MANAGE

- People
- User Fields
- Organization Fields
- Brands
- Views
- Macros
- Tags
- Ticket Fields
- Ticket Forms
- Dynamic Content
- Sandbox

CHANNELS

- Email
- Twitter
- Chat
- Facebook
- Talk
- Widget**
- API
- Mobile SDK
- Channel Integrations [View](#)

Channels / Widget

The Web Widget makes it easy for your customers to get the help they need, wherever they are on your website, with one click or tap. [Learn more](#)

Omni Wear

Customization Setup

Contact form
A simple contact form that enables your customers to send a request and create a ticket.

Custom ticket fields
Select up to two custom ticket fields to include in the contact form of your widget. [Settings](#) Custom ticket fields [v](#)

Chat
Chat directly with your customers via your website using Zendesk Chat. [Settings](#)

Help Center
Deflect tickets by serving knowledge base articles. [Settings](#)

Contextual Help
Automatically suggest knowledge base articles based on the web page a visitor is currently viewing. [Learn more](#)

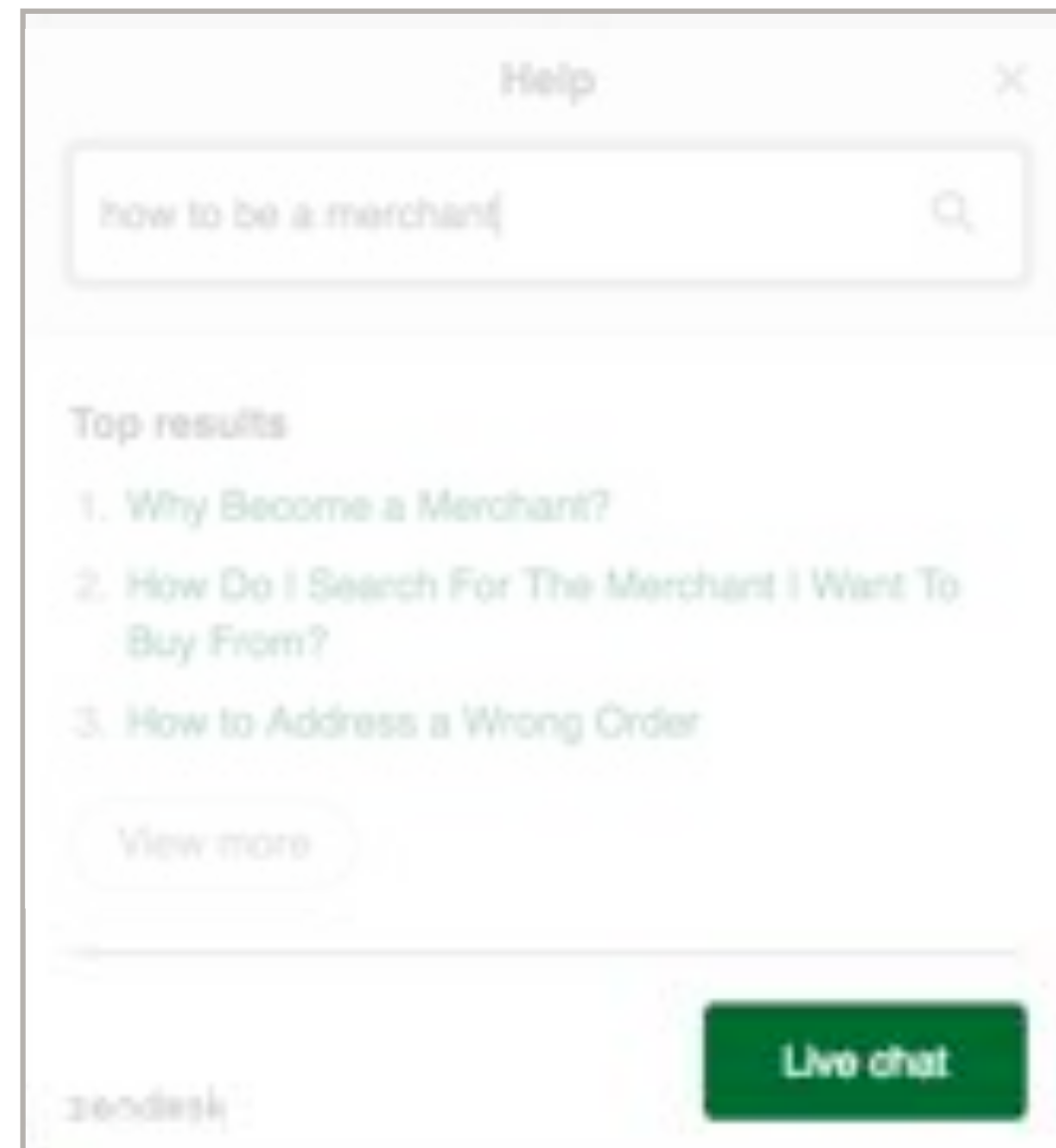
Security settings
Configure your widget to authenticate users and handle restricted content. [Configure](#)



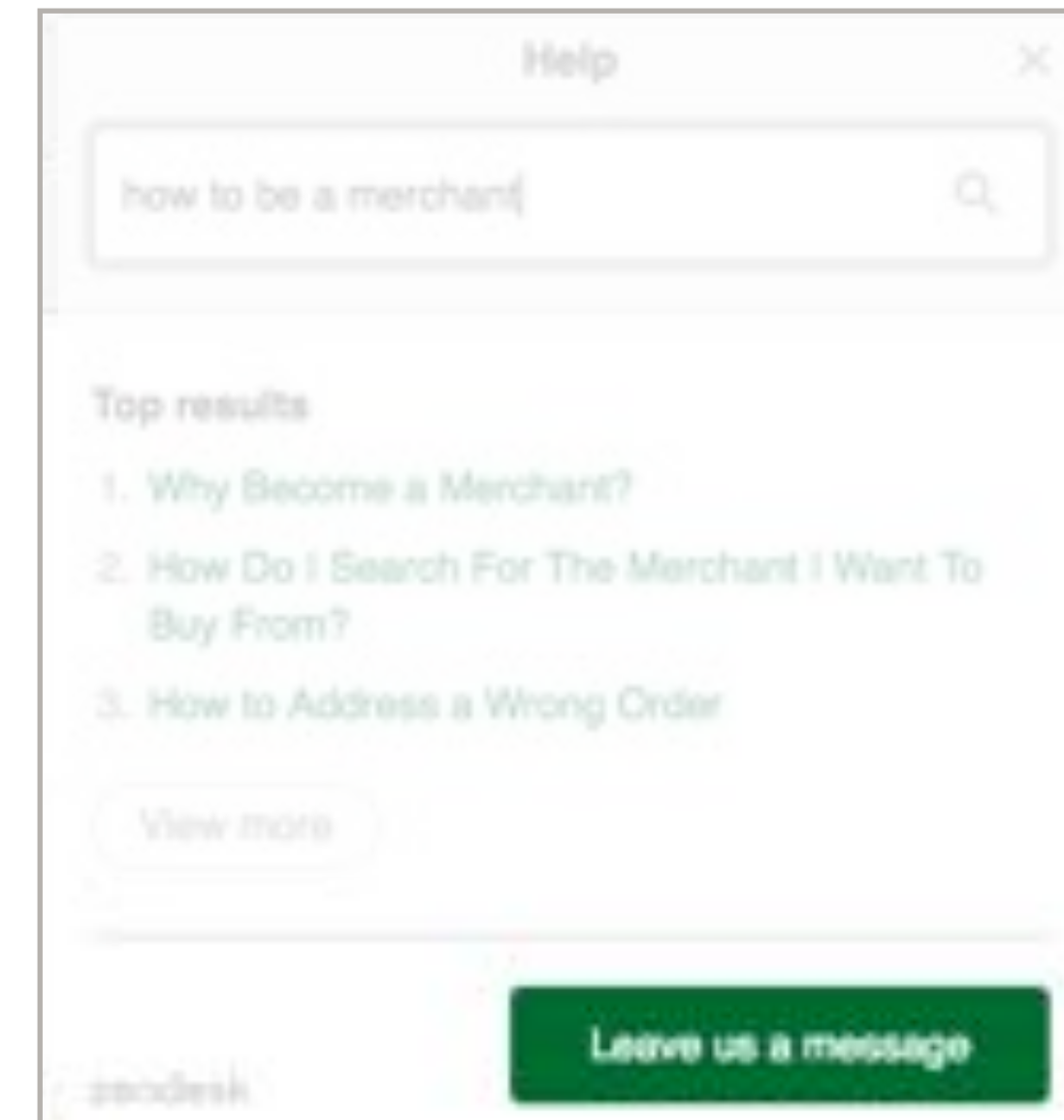
Set Up and Configure Your Web Widget

Zendesk products in the web widget

Chat is turned on,
Agents are Online



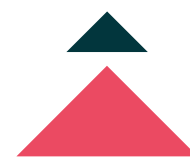
Chat is not available,
Support is enabled



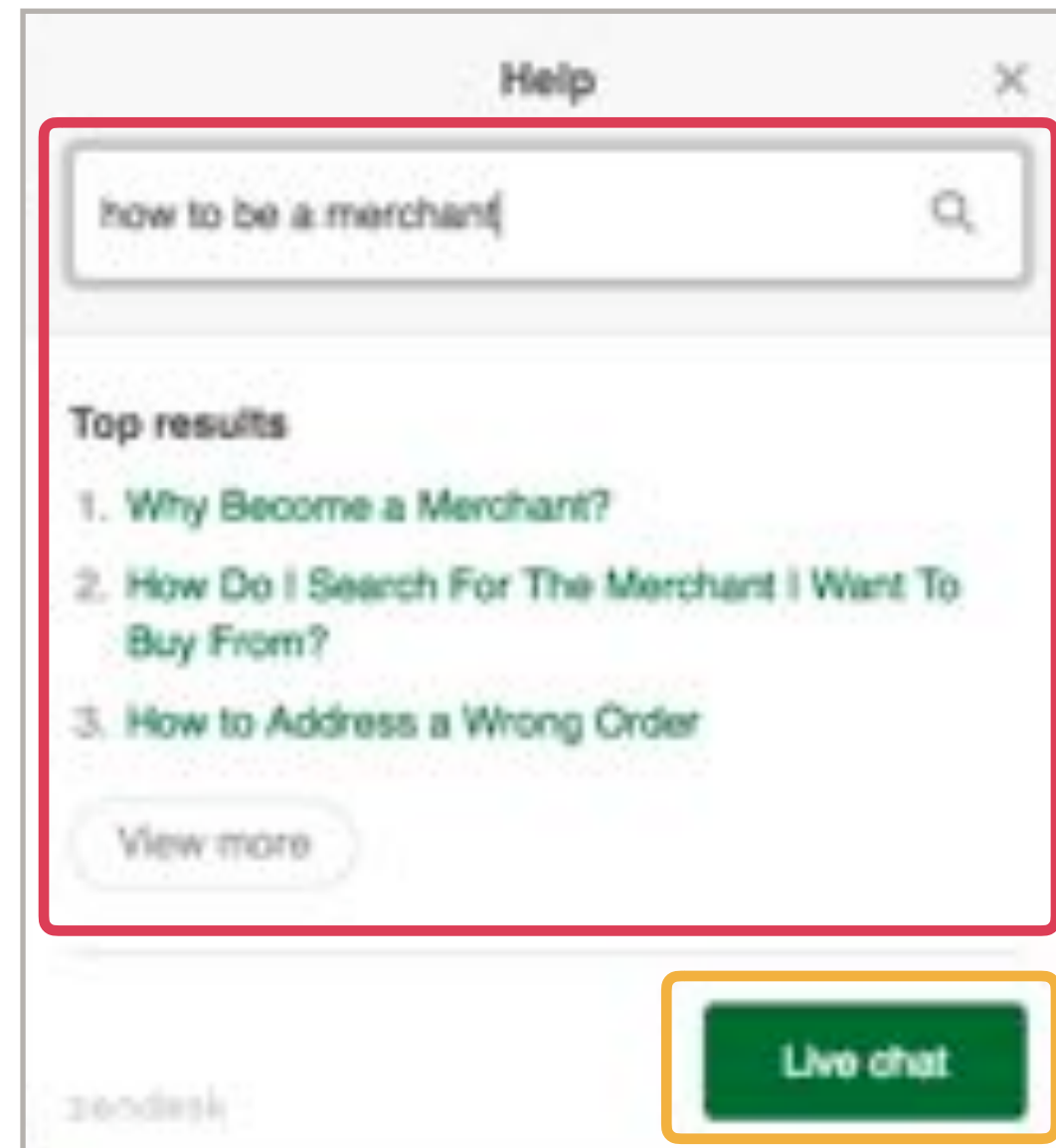
Set Up and Configure Your Web Widget

Zendesk products in the web widget

Find knowledge
base articles



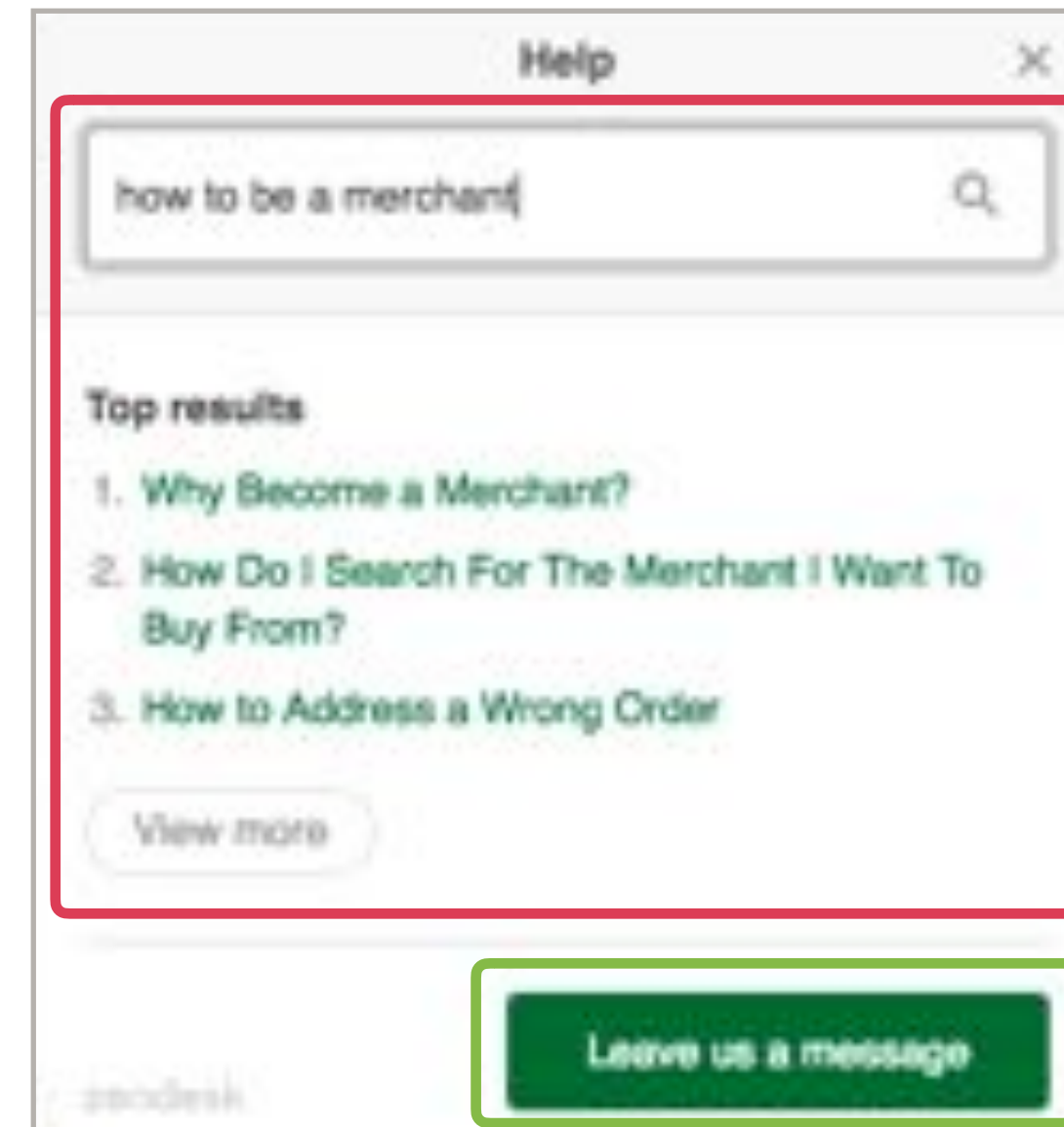
guide



Chat with
an agent



chat



Submit a
Support ticket



support

Set Up and Configure Your Web Widget

Channels / Widget

The Web Widget makes it easy for your customers to get the help they need, wherever they are on your website, with one click or tap. [Learn more](#)

Omni Wear

Customization **Setup**

Installation

Copy the following script and paste it into your website's HTML source code before the closing `</head>` tag. This code must be inserted into every page you want to show the widget on. Note that the widget will not slow down your web pages.

```
<!-- Start of z3nexperience Zendesk Widget script -->
<script><![CDATA[window.zEmbed=function(a,z){var n,o,d,l,s,e=[];r=document.createElement("iframe");window.zEmbed=function()
{a.push(arguments);window.zE=window.zE||window.zEmbed;r.src=""};r.setAttribute("style","display:none");d=document.getElementsByTagName("script");d=d[d.length-
1];d.parentNode.insertBefore(t,d);r.contentWindow.s=document.createElement("script");s=document.createElement("script");s.setAttribute("src","https://assets.zendesk.com/embeddable_framework/main.js");this.t=new
Date;this.zendeskHost="z3nexperience.zendesk.com";this.zE.Queue=[];this.body.appendChild(r);s.write("<body
onload=document._z3nexperience.zendesk.com");s.close();}
})();</script>
<!-- End of z3nexperience Zendesk Widget script -->
```

Copy to clipboard

Add to Help Center

Automatically add the Web Widget to your Help Center.



Demo

Configure your Web Widget from Support

Set Up and Configure Your Web Widget

Try it!

Setup and configure your Web Widget

1. Go to **Admin > Channels > Widget**, then click on the Customization tab.
2. Click the toggle On for the Contact form, Chat and Help Center components.
3. Select your Theme color and the position of the Widget.
4. Set the text for the Widget button and the Contact form button.
5. Click **Save**.
6. If you have Guide enabled, switch to the Setup tab, then click the toggle **Add to Help Center** on.



Demo

Configure Web Widget settings within Chat

Set Up and Configure Your Web Widget

Web widget best practices



Start small

Chat volume is unpredictable at first. Try placing the widget on a few key pages first rather than every page so that your agents can become comfortable chatting with customers.

Align your goals

Where you place the widget should align with your goals. To increase sales, place it on the checkout page. To increase CSAT place it directly in your product.

Deflect chats

Using Guide with Chat in the web widget will cut down on the number of chats your agents handle, as customers answer their own questions.



Set Up and Configure Your Web Widget

Pop quiz



How many channels can you enable in the Widget?

Add Operating Hours



Operating hours allow admins to set a daily or weekly **schedule for when agents appear online.**

Add Operating Hours

Change operating hours

Account

Subscription | Contact Support | Apps | API | Email Firing | Chat Tags | File Sending | **Operating hours** | Timezone | Security | Water List

Operating hours

Configure your operating hours schedule for your account. Schedules can be account-wide or department-specific and determine when your widget appears online to visitors. Using operating hours overrides the personal site timeout settings. [Learn more](#)

Set schedule: **Account** | Department

Online Schedule: Daily

<input checked="" type="checkbox"/> Monday	9:00 AM - 5:00 PM
<input checked="" type="checkbox"/> Tuesday	9:00 AM - 5:00 PM
<input checked="" type="checkbox"/> Wednesday	9:00 AM - 5:00 PM
<input checked="" type="checkbox"/> Thursday	9:00 AM - 5:00 PM
<input checked="" type="checkbox"/> Friday	9:00 AM - 5:00 PM
<input type="checkbox"/> Saturday	Closed all day
<input type="checkbox"/> Sunday	Closed all day

Change your timezone under Settings > Account > Timezone

Display operating hours: Show operating hours on offline and pre-chat forms. Forms must be enabled under Settings > Widget > Forms

[Save Changes](#) [Revert Changes](#) [Reset to Defaults](#)

Quick Tips

Operating Hours

Create multiple schedules to manage your operating hours. There are two types of schedules, account-wide and department-specific.

Account Schedule

A single account-wide schedule that applies across your entire account. You cannot use department-specific schedules.

Department Schedule

Multiple departments can use department schedules. Each department can use multiple schedules and multiple departments can also be part of the same schedule.



Demo

Add operating hours

Add Operating Hours

Try it!

Edit operating hours

1. Navigate to Settings > Account and choose Operating Hours at the top of the screen.
2. Turn Operating Hours On and add Account Operating Hours so agents are available M-F from 7am to 7pm.
3. Save Changes.



Configure Support Ticket Creation



Configure Support Ticket Creation

Configure Support ticket creation

The screenshot shows the 'Account' settings page for 'Zendesk Support' in the Zendesk Admin Center. The left sidebar is dark teal with a light teal 'Settings' button. The 'Account' menu item is highlighted with an orange box. The main content area is white and features a navigation bar with tabs: Subscription, **Zendesk Support** (highlighted with an orange box), Apps, API, Email Piping, Chat Tags, File Sending, Operating Hours, Timezone, Security, and Visitor List. Below the navigation bar, there are two sections: 'Ticket Creation - Chats' and 'Ticket Creation - Offline Messages'. Each section has three settings: 'Automatic Ticket Creation' (with 'Automatic' and 'Manual' radio buttons), 'Transcript Visibility' (with 'Public' and 'Private' radio buttons), and 'Ticket Assignment' (with 'Last Agent' and 'First Agent' radio buttons). A 'Ticket Assignment' sidebar on the right provides instructions on how to change the linked Zendesk Support agent. At the bottom, there are three buttons: 'Save Changes' (orange), 'Revert Changes', and 'Reset to Defaults'.

Account

Subscription **Zendesk Support** Apps API Email Piping Chat Tags File Sending Operating Hours Timezone Security Visitor List

Ticket Creation - Chats

Automatic Ticket Creation Automatic Manual
A ticket will be automatically created at the start of each chat

Transcript Visibility Public Private
The chat transcript will be incrementally appended to the ticket as a public reply

Ticket Assignment Last Agent First Agent
The ticket will be assigned to the first agent who served the chat

Ticket Creation - Offline Messages

Automatic Ticket Creation Automatic Manual
A ticket will be automatically created for each offline message

Transcript Visibility Public Private
The offline message will be appended to the ticket as a public reply

Ticket Assignment
Tickets will be assigned to the Zendesk Support agent linked to the Chat agent who served the chat.
To change your linked Zendesk Support agent, go to [Settings > Personal > Zendesk Support](#).
To change the linked Zendesk Support agent for other Chat agents, go to [Settings > Agents](#).

[Save Changes](#) [Revert Changes](#) [Reset to Defaults](#)



Set Up Zendesk Chat

Add Agents

Add Roles and Permissions

Set Up and Configure Your Web Widget

Add Operating Hours

Configure Support Ticket Creation



An Overview of
Zendesk Chat

Set Up
Zendesk Chat

Optimize
Zendesk Chat

Measure
Zendesk Chat

Optimize Zendesk Chat

Utilize Shortcuts

Set Up a Trigger

Add Agents to a Department

Route a Chat to an Agent with Skills Routing

Optimize Zendesk Chat

Tools for managing incoming chats

Built by agents
OR admins



Shortcuts

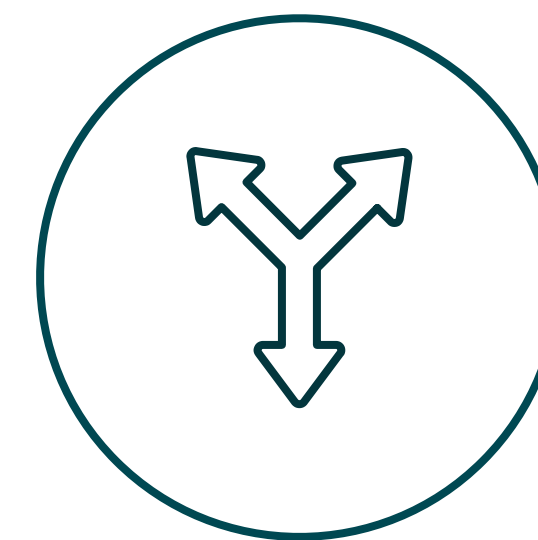
Built by admins,
powered by
triggers



Proactive Chat



Departments



Skills routing

Utilize Shortcuts



Shortcuts allow agents to add **pre-written responses** to chats in seconds.

Utilize Apps and Shortcuts

Adding a shortcut

The screenshot displays a user interface for managing chatbot shortcuts. On the left, a dark sidebar contains navigation options: Inactive, Home, Visitors, History (with a notification badge), Analytics, Monitor, Settings (highlighted), Agents, Departments, Roles, Routing, Shortcuts (highlighted), Scripts, Triggers, Goals, Widgets, Personal, Account, and Requests. The main content area is titled 'Shortcuts' and features a search bar and an 'Add Shortcut' button (highlighted in orange). Below this is a table of shortcuts:

Shortcut	Message	Tags
gift wrapping	Which color of wrapping paper would you like? <input type="radio"/> Gold <input type="radio"/> Blue <input type="radio"/> Silver	
goodbye	Thanks for chatting with us. Have we resolved your question(s)? <input type="radio"/> Yes <input type="radio"/> No	[goodbye_name]
help	Do you need any help? <input type="radio"/> Yes <input type="radio"/> No	[help_name]
hi	Hello I haven't heard from you in a few minutes, do you need more time? <input type="radio"/> Yes, please <input type="radio"/> No, thank you	
product	What product are you interested in? <input type="radio"/> Sals <input type="radio"/> Amochal <input type="radio"/> Chaste Longe	
returning	Welcome back. How can we help you today?	[returning_name]
hi	Hello [visitor_name] How can we help?	
stuff	This is the words www.google.com	

At the bottom, a note states: 'Shortcuts can save time by automatically turning a few characters into a complete sentence. [Watch the video](#)'



Demo

Set Up a shortcut

Utilize Apps and Shortcuts

Try it!

Set up a shortcut

1. Navigate to **Settings** > **Shortcuts**, select **Add Shortcut**.
2. Think of a common question your agents might get.
3. Name your Shortcut (something easy to recall) and add a Message.



Set Up a Trigger



Triggers **automatically perform actions** when certain conditions are met.

Set Up a Trigger

Examples of triggers used for proactive chat

If

A visitor has been on your welcome page for 30 seconds and is idle ...

Then

send them a proactive message asking if they need help to keep them engaged.



Set Up a Trigger

Examples of triggers used for proactive chat

If

A visitor is returning to your site for a second or third time ...

Then

reach out and say hello with a personalized greeting including their name to make them feel valued.



Manage Incoming Chats

Add a trigger

The screenshot displays a web interface for managing chat triggers. On the left is a dark teal sidebar with a navigation menu. The 'Triggers' menu item is highlighted with an orange box. The main content area is titled 'Triggers' and features a search bar and an orange 'Add Trigger' button, also highlighted with an orange box. Below the search bar is a table with columns for 'Name', 'Description', and 'Enabled'. The table is currently empty, showing only a descriptive text: 'Automatically engage high-value customers by sending them a customized chat invite. [Watch the video](#)'.

Name	Description	Enabled
Automatically engage high-value customers by sending them a customized chat invite. Watch the video		



Manage Incoming Chats

Set up a trigger

Trigger Status: Enabled (Disabled)

Trigger Name: Returning customer

Description: Fire chat for returning customer to site

Fire only once per visitor: Each visitor will receive this message only once

Customize Trigger (Visual | Developer)

Run trigger: When a visitor has loaded the chat widget

Check conditions: Check all of the following conditions

- Visitor previous visits - Greater than - 0
- Visitor requesting chat - is false
- Visitor served - is false

Perform the following actions:

- Send message to visitor - Name of agent: Welcome back! How can I help?

Buttons: Create Trigger, Cancel

Determine when the trigger will fire

Add conditions

Add actions



Demo

Set up a trigger

Manage Incoming Chats

Try it!

Set up a trigger

1. Navigate to **Settings > Triggers**, select **Add Trigger**.
2. Think of a trigger that will benefit your workflow and build it.

OR

Set up a trigger that will proactively greet a visitor who has previously visited the site.

- **Condition: visitor previous visits > Greater than > 0**
- **Action: Send message to visitor > Name of Agent > add a message**



What does this trigger do?



Trigger Name: Shopping cart push

Description: Customer is idle on cart. Push to purchase.

Fire only once per visitor: Each visitor will receive this message only once

Customize Trigger Visual Developer

Run trigger: When a visitor has loaded the chat widget

Check conditions: Check all of the following conditions

- Visitor page url **Equals** eatwell.com/cart
URL of the page the visitor is currently on
- Still on page **60**
Delay (in secs) before checking next condition
- Visitor requesting chat **Is false**
'true' if visitor is requesting chat
- Visitor served **Is false**
'true' if visitor is currently served by agents

Perform the following actions

- Send Message to Visitor **Stephanie** Hi there! I see you have some it

Add Agents to a Department



Use departments to **filter chat requests** to a specific group of agents.

Manage Incoming Chats

Add agents to a department

The screenshot displays the 'Departments' management interface. On the left, a dark sidebar contains navigation options: Invisible, Home, Visitors, History (with a '14' notification badge), Analytics, Monitor, Settings (highlighted in teal), Agents, Departments (highlighted with an orange box), Roles, Routing, Shortcuts, General, Triggers, Goals, Widget, Personal, Account, and 0 Requests. The main content area is titled 'Departments' and includes a search bar, an 'Add Department' button (highlighted with an orange box), and a status indicator '4 Enabled / 4 Departments'. Below this is a table with columns for Name, Description, Agents, and Enabled. The table lists four departments: Delivery, Billing, Sales, and Training, each with a list of assigned agents and a checked 'Enabled' status. At the bottom, there is a note: 'Add a pre-chat Form to allow visitors to choose a department before starting a chat.' with a 'Create Pre-Chat Form' button.

Name	Description	Agents	Enabled
Delivery	--	Aubrey Kaine - CE, Jennifer Hansen - CE, Brian Pospinghaus - CE	✓
Billing	--	Aubrey Kaine - CE, Burk Mondland - CE	✓
Sales	--	Aubrey Kaine - CE, Kate Hoffner - CE	✓
Training	--	Aubrey Kaine - CE, Jennifer Hansen - CE, Jennifer Law - CE	✓



Manage Incoming Chats

Add agents to a department

The screenshot shows the 'Add Department' configuration page. On the left is a dark sidebar with navigation options: Invisible, Home, Visitors, History (14), Analytics, Monitor, Settings (highlighted), Agents, Departments, Roles, Routing, Groups, Banned, Triggers, Goals, Widget, Personal, Account, and 0 Requests. The main content area is titled 'Add Department' and includes:

- Department Status:** 'Enabled' (selected) and 'Disabled' buttons. A note below reads 'Unlimited Departments allowed.'
- Name:** A text input field containing 'Product'.
- Description:** A text area containing 'Questions about the product.'
- Department Agents:** A list of currently assigned agents: Aubrey Kaine - CE, Jennifer Law - CE, and Francis Kind - CE.
- Agent Selection:** A section titled 'Select at least 1 active agent to add to this department' with a list of available agents: Alexander Migala - CE, Beatrix Abbott - CE, Burk Mendland - CE, Cruz Smith - CE, Jennifer Hansen - CE, Kate Hoffman - CE, Leylar Freeman - CE, Megan Browning - CE, and Shrin Pongplinghaus - CE.
- Buttons:** 'Create Department' (orange) and 'Cancel' (grey) buttons at the bottom.

On the right side, there is a 'Quick Tips' section with a video thumbnail and two tips:

- Assign Agents to Departments:** You can assign agents to the departments you have created (e.g. sales, technical support, etc). Once configured, visitors can direct chat requests towards the appropriate department.
- Enable Pre-Chat Forms:** Visitors can select a Department before starting a chat, using the Pre-Chat Form (enabled in Widget > Forms).



Route a Chat to an Agent Using Skills Routing



Use skills routing to **identify specific skills** an agent may have to pair visitors and agents accordingly.

Manage Incoming Chats

Routing chats

The screenshot shows the 'Routing' settings page in a chat management interface. The left sidebar contains navigation options: Online, Home, Visitors, History (13), Analytics, Monitor, Settings (highlighted), Agents, Departments, Roles, Routing (highlighted), Shortcuts, Banner, Triggers, Goals, Widget, Personal, Account, and 0 Requests. The main content area is titled 'Routing' and includes a 'Settings' tab and a 'Stats' tab. The 'Chat Routing' section allows users to choose how agents receive incoming chat requests, with options for 'Broadcast' and 'Assigned'. The 'Chat Limit' section allows users to limit the number of chats that each agent is allowed to take at one time, with a toggle for 'On' or 'Off', an 'Apply To' dropdown (Account, Agent), and a 'Maximum Chats' input field (set to 6). The 'Quick Tips' section provides guidance on Broadcast and Assigned chat routing. The page includes 'Save Changes', 'Revert Changes', and 'Reset to Defaults' buttons.

Routing

Settings Stats

Chat Routing

Choose how agents will receive incoming chat requests.

Broadcast **Assigned**

Agents are notified of all incoming chat requests and serve chats from a shared queue.

Chat Limit

Limit the number of chats that each agent is allowed to take at one time.

Apply To: Account Agent

Maximum Chats: 6

This chat limit will apply to all agents.

On **Off**

Save Changes **Revert Changes** **Reset to Defaults**

Quick Tips

Broadcast

Broadcasting chats gives agents more autonomy, allowing them to work at their own pace. Set a chat limit to control quality by preventing agents from taking on too many chats at once.

Assigned

Assigned chats help maintain an even workload distribution, especially for larger teams. Chat limits keep agents from getting overwhelmed by chats, especially during high traffic. Experienced agents can help clear the queue faster with the Hybrid Assignment Mode, Smart Reassignments and Automatic Idle to reduce visitor wait time by preventing chats from getting assigned to inactive agents.

[Learn more](#)



Demo

Set up skills routing

Manage Incoming Chats

Best practices for using triggers



Find the right agent

Get customer's requests in front of agents who are specialists in an area in the shortest amount of time. Use triggers to assign requests to smaller departments based on the pre-chat form.

Reach out

Proactively reach out to customers to welcome them to your site and ask how you can help. Users who take part in proactive chat are more satisfied.

Optimize Zendesk Chat

Utilize Shortcuts

Set Up a Trigger

Add Agents to a Department

Route a Chat to an Agent with Skills Routing



Measure Zendesk Chat

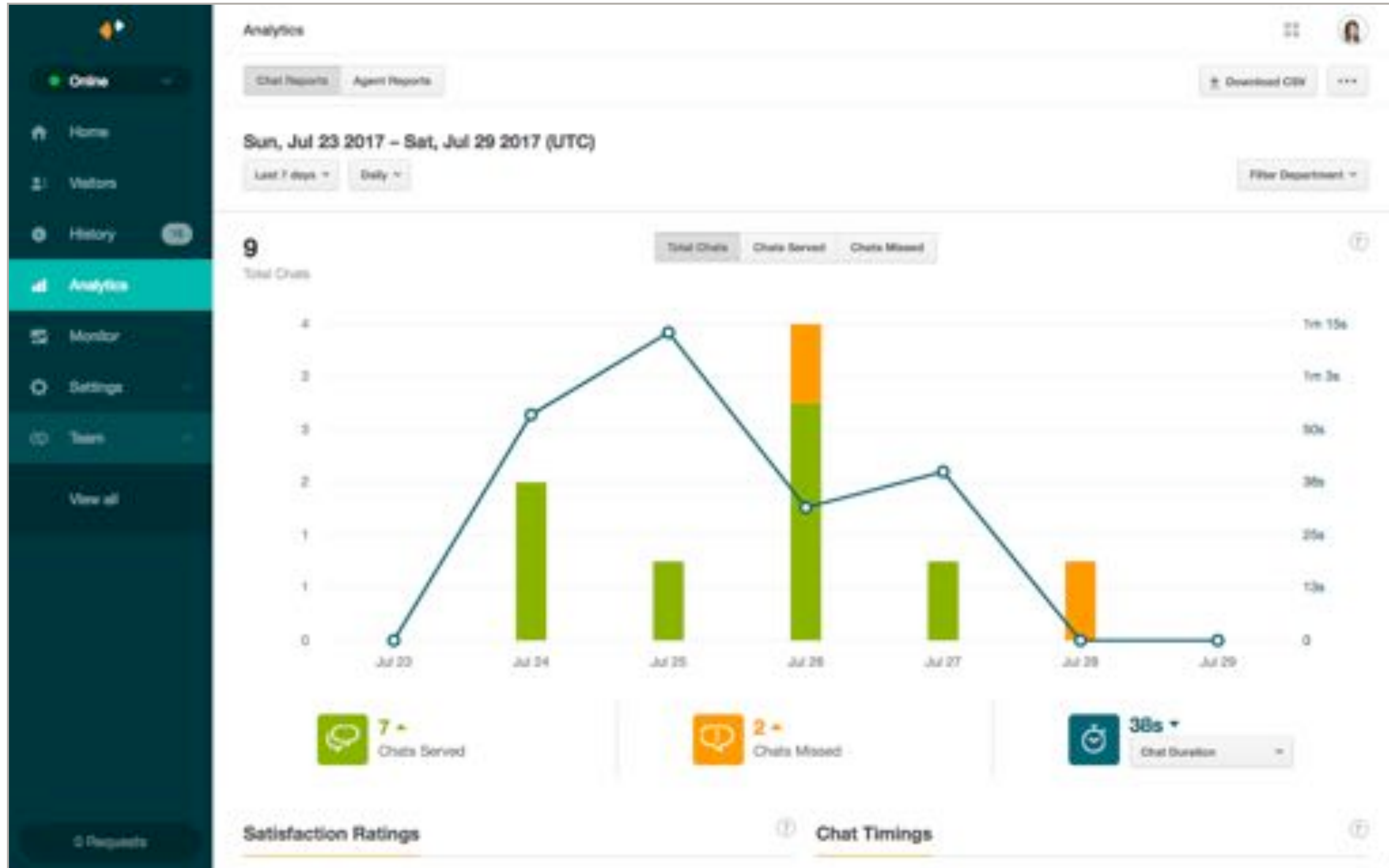
Explore Chat Analytics

Explore Chat Analytics



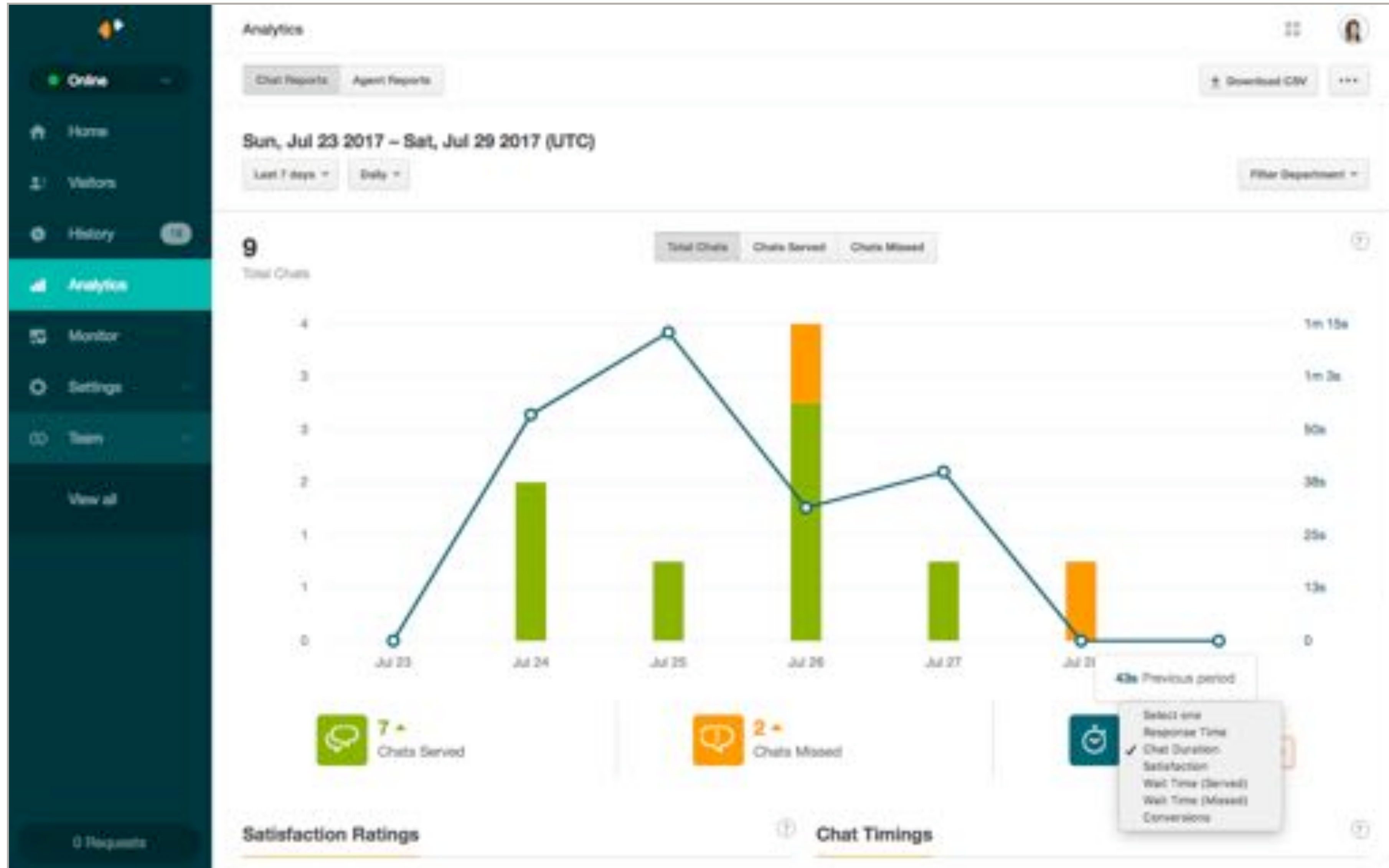
Explore Chat Analytics

Chat reports



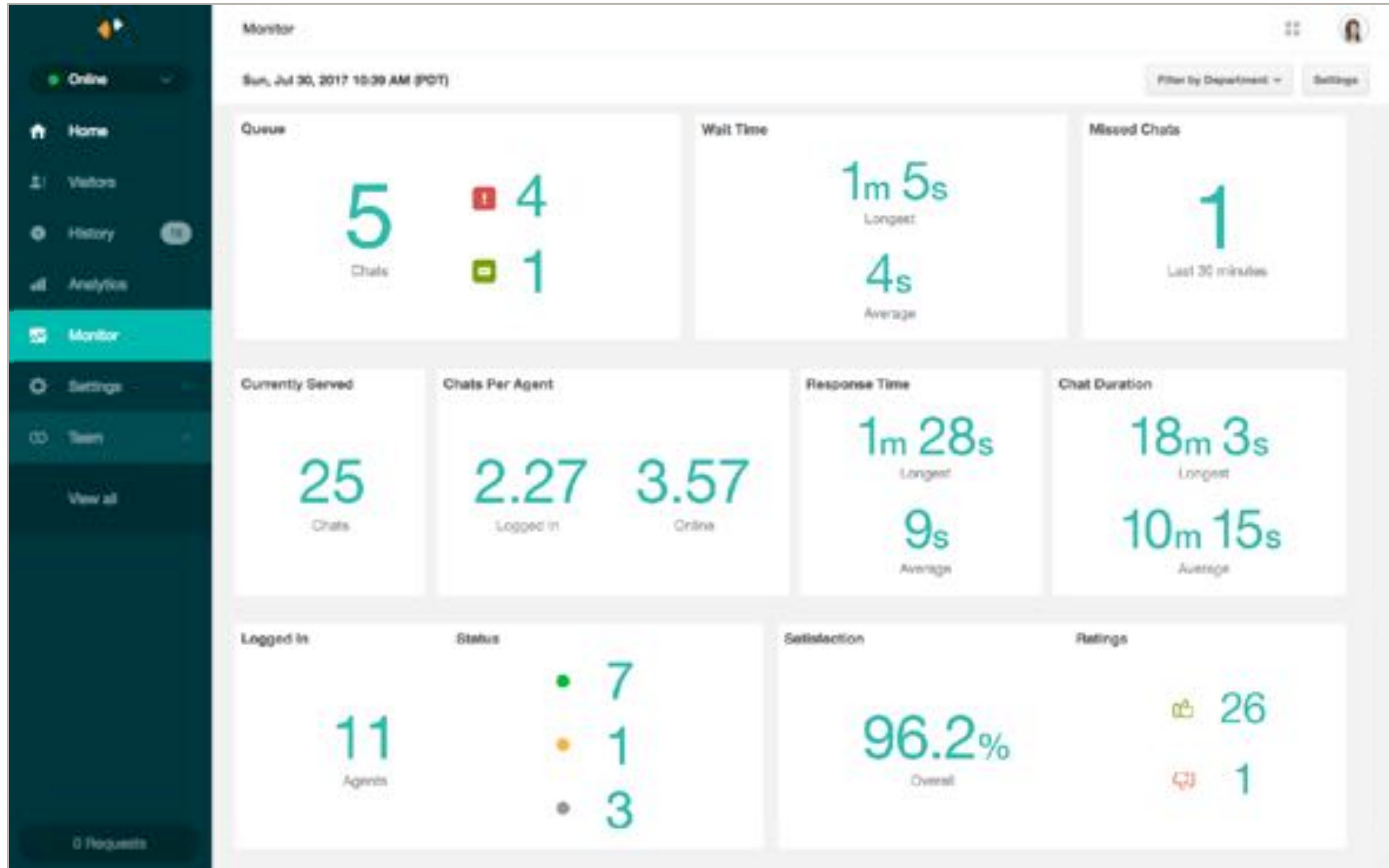
Explore Chat Analytics

Chat reports



Explore Chat Analytics

Real-time monitor



Demo

Access Chat analytics

Explore Chat Analytics

Try it!

Access Chat analytics

1. Navigate to **Analytics**.
2. Change the Chat Report from Last 7 Days to a Custom date range.
3. Enable the **Chat Duration** metric in blue.
4. Go to **Agent Reports**.
5. Navigate to **Agents Logged In**.
6. Set up a weekly and monthly email report for yourself.



Measure Zendesk Chat

Explore Chat Analytics



An Overview of
Zendesk Chat

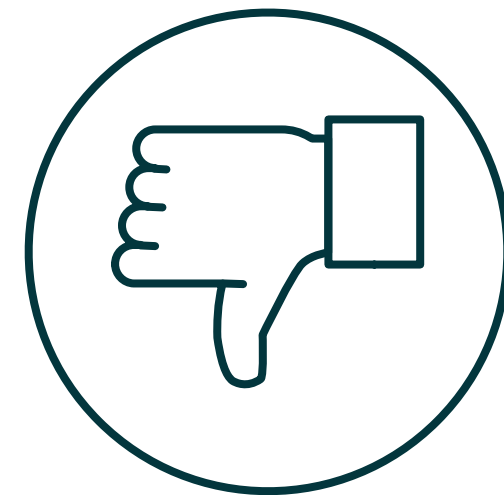
Set Up
Zendesk Chat

Optimize
Zendesk Chat

Measure
Zendesk Chat



Post-Course Survey





zendesk